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ABSTRACT

This annotated bibliography includes reference sources pertaining to business, economics, and management that are located in the libraries of the Portland and Gorham campuses of the University of Southern Maine. Specific reference sources are listed under the categories of: (1) indexes and abstracts; (2) dictionaries and encyclopedias, including sources for the fields of accounting, advertising, economics, management, and banking, finance, and investment; (3) directories, including industrial directories, directories of associations, and franchise directories; (4) statistical information, including government periodicals and census data; (5) corporate and investment information; (6) financial and operating ratios; (7) Maine and Portland source materials; and (8) bibliographies and source books of business literature. Typical entries include a brief description of the reference source and its call number. (KM)

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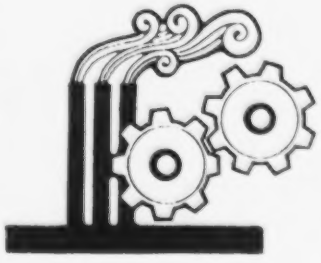

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

Because the School of Business, Economics, and Management is located on USM's Portland Campus, most of the books, reference sources, indexes, periodicals, government publications and other related materials can be found in the Portland Campus Library. All items identified in this brochure can be found there, while those labeled Por Gor can be found in both campus libraries.

Indexes and Abstracts

Periodical and newspaper indexes are an important source for current information. In addition to the printed indexes, several others are available online, giving access to much business data. Consult a reference librarian for further information on business indexes and computerized literature searching.

Business Index This is a computer-generated index which is viewed on a screen. It is up-to-date and comprehensive, indexing more than 800 business-related journals and newspapers and cumulating the last four years. It is most efficiently used with a printout of USM's journal and newspaper holdings.

Business Periodicals Index (Ref Z 7164 C81 year) Published monthly since 1958, this subject index to about 300 periodicals covers a broad range of fields in business and economics.

New York Times Index (Ref A1 21 N44 year Por Gor) Indexes the country's leading general newspaper and summarizes the articles. USM receives the late city edition.

Wall Street Journal Index (Ref HG 1 W26 year) Compiled from the final eastern edition. This index to the nation's most important business newspaper is in two parts. Corporate news arranged by name of corporation is in the first section. General business news under broad subject categories is indexed in the second section. Published monthly with annual cumulations.

Boston Globe Index (Ref A1 21 B63 year) Since 1983.

Public Affairs Information Service (Ref Z 7163 P9 year Por Gor) Published since 1915, this index covers a broad range of subjects in the social sciences. Especially useful for such topics as personal income and welfare economics. Indexes a wide variety of reports, government publications, books and periodicals.

Monthly Catalog of United States Government Publications (Ref Z 1223 A 18 Por Gor) A monthly listing of new publications issued by the various departments and agencies of the U.S. Government. An index is issued annually.

Accountants' Index (Ref Z 7164 C81 A5 year) Published since 1921, indexes by subject and author, books, pamphlets, and periodicals in its field.

International Abstracts in Operations Research (Ref Q 500 15)
"Abstracts of articles in worldwide journals, arranged by topic within four broad subject areas: models of common processes; experiment and special applications; theoretical; professional. Also includes sources for book reviews and a few books". Issued quarterly and indexed.

Dictionaries and Encyclopedias

For definitions of terms and short articles on many business topics the following may be useful:

Accounting

Kohler, E. L. A Dictionary for Accountants (Ref HF 5621 K6)

March, Robert. Running Press Glossary of Accounting Language (Ref HF 5621 M358) Basic terminology for accountants.

Pescow, Jerome K., editor. Encyclopedia of Accounting Systems (Ref HF 5635 E54) 3 volumes. Useful summaries of accounting systems and methods used in many different businesses.

Advertising

Urdang, Laurence, editor. Dictionary of Advertising Terms (Ref HF 5803 T37)

Banking, Finance, and Investment

Davids, Lewis E. Dictionary of Banking and Finance (Ref HG 151 D365)

Munn, G. Encyclopedia of Banking and Finance (Ref HG 151 M8) A fine encyclopedia and up-to-date. Uses illustrative examples and includes bibliographies for further reading on many topics.

Pessin, Allan H. et al. Words of Wall Street: 2,000 Investment Terms Defined. (Ref HG 4513 P47)

Economics

Greenwald, Douglas. Encyclopedia of Economics (Ref HB 61 E55 Por Gor)

McGraw-Hill Dictionary of Modern Economics (Ref HB 61 M3 Por Gor)

Management

Heyel, Carl, editor. The Encyclopedia of Management (Ref HD 30.15 E49) An excellent source. Includes bibliographies for many entries.

Oran, Daniel. The MBA's Dictionary. (Ref HD 70 U5 068)

Rosenberg, Jerry M. Dictionary of Business and Management (Ref HF 1002 R68)

Shafritz, Jay M. Dictionary of Personnel Management and Labor Relations (Ref HF 5549 A23 S52)

Wortman, Leon A. A Deskbook of Business Management Terms (Ref HD 30.15 W67)

Directories

Generally a directory will provide very brief information about a firm or individual. Included in directories of business will be addresses and phone numbers, names and titles of top executives, number of employees, products and SIC classifications. Biographical directories will provide succinct information about an individual, including current address.

Industrial Directories

Million Dollar Directory (Ref HC 102 D8 year) Lists many thousands of U.S. companies as well as the names of their officers, their products, sales, number of employees, etc. This is USM's single most comprehensive business directory. Published annually.

Standard and Poor's Register of Corporations, Directors and Executives (Ref HG 4057 A4 year) Lists many corporations, their officers, sales, and much more. Less comprehensive than the previous listing but contains a separate volume of biographical information on corporate executives. Published annually.

Thomas' Register of American Manufacturers (Ref T12 T6 year Por Gor) A multi-volume directory of American manufacturing firms. Products (i.e., gloves, insulation, heaters, springs, etc.) are listed alphabetically. Manufacturers' addresses are given as are their asset ranges, and for some companies, a product catalog. The definitive national source to determine what companies manufacture a particular product. Published annually.

SIC Manual (Ref HF 1042 A55 1972) This federal government publication describes the Standard Industrial Classification, a system of 4-digit numbers which classify all of the products and services produced by manufacturing companies and other businesses in the U.S. It has a 15 page 1977 supplement. A shorter SIC number list is contained in the third volume of Standard and Poor's Register..... (see above).

Who's Who in Finance and Industry (Ref HG 3023 A2 W5) Sketches of leading business men and women. Included is an index of principal businesses and executives.

Directories of Associations

Business Organizations and Agencies Directory (Ref HF 3010 B87) Lists trade and business organizations as well as other

business related agencies like chambers of commerce, labor unions, convention centers, trade fairs, etc. Includes a master index.

Encyclopedia of Associations (Ref HS 17 G335 year Por Gor)
A comprehensive list of all kinds of national associations including professional and trade organizations. Gives names of chief officer, short statement of purpose, membership and publications. Three volumes; fully indexed.

Franchise Directories

Directory of Franchising Organizations (Ref HF 5429.3 D5)
Franchise opportunities available, including descriptions and needed investment. A franchise evaluation checklist is also included.

Other Directories

Directory of American Savings and Loan Associations (Ref HG 2441 D53) Arranged alphabetically by state.

Directory of Companies Required to File Annual Reports with the Securities and Exchange Commission (Ref HG 4556 U5 A39)
Arranged both alphabetically and by industry group.

Women's Business and Resource Directory (Ref HD 2346 U52 M26)
A listing of Maine women in business as well as resources for women.

Statistical Information

The U.S. Government is the largest statistical gathering agency in the world, and the Government Printing Office issues a vast amount of material - narrative and statistical - of relevance to the business community. The USM Library catalogs only a small portion of this material; the bulk of government documents are shelved in a separate document collection, and the Monthly Catalog (Ref Z 1223 A18) must be used to locate the majority of federal documents. Some of the more important documents and commercial sources of statistical data which are cataloged follow:

Statistical Abstract of the United States (Ref HA 202 A3 year Por Gor) Most comprehensive compilation of industrial, social, political, and economic statistics. A new edition appears annually.

Historical Statistics of the United States (Ref HA 202 A38 Por Gor) Provides retrospective information.

American Statistics Index (Ref Z 7554 U5 A46 year) A "comprehensive guide and index to the statistical publications of the U.S. Government."

Business Statistics (Ref HC 101 A13122 year) A biennial supplement to the "Survey of Current Business" (see p.7). Retrospective record of the statistical series appearing in the Survey.

Commodity Year Book (Ref HF 1041 C56 year) Published annually with information on production, exports and prices for about 100 commodities.

Statistics Sources (Ref Z 7551 S84) A subject index to sources of data on industrial, business, financial and other topics for the U.S. and other nations.

U.S. Industrial Outlook (Ref HC 106.5 A17 year) Trends and projections for more than 350 manufacturing and service industries.

Rand McNally Commercial Atlas and Marketing Guide (Atlas Case G1201 G1R3 year Por Gor) A useful atlas for business students. Includes census, manufacturing, business and other data, as well as information on retail sales, transportation, and postal zones.

Economic Sourcebook of Government Statistics (Ref HC 106.8 H63) A guide to sources of government-generated economic data, i.e., interest notes, employment, earnings, etc.

Economic Report of the President (Ref HC 106.5 A27 year) Published annually. Includes "statistical tables relating to income, employment, and production." Updates to these tables can be found in the monthly "Economic Indicators."

Sales and Marketing Management (A monthly journal, shelved with periodicals) In July the annual "Survey of Buying Power" is issued. For each major marketing area, such as Portland, it lists family income ranges, retail sales figures, census information, and other statistics useful for market research and economics studies. The October, February and April issues contain other useful statistical compilations.

Measuring Markets: A Guide to the Use of Federal and State Statistical Data (Ref HF 5415.3 U6)

Government Periodicals

The following, published monthly by the federal government, are important sources for American business and economic statistics. They are shelved with the PERIODICALS COLLECTION.

Business Conditions Digest (Por Gor) Emphasizes leading cyclical indicators of most use to business analysts and forecasters.

CPI Detailed Report Consumer price index for selected cities and areas in the country.

Economic Indicators (Por Gor) Basic statistics on the U.S. economy, e.g., GNP, prices, production.

Federal Reserve Bulletin Each issue contains a section of basic "Financial and Business Statistics", as well as data on the money supply and other financial concerns of the Federal Reserve banking system.

Monthly Labor Review Current statistics for employment and unemployment, labor turnover, hours and earnings, wholesale and retail prices.

Survey of Current Business Considered the most comprehensive summary for current business statistics. Includes national income by industry, personal consumption expenditure, government expenditures, foreign transactions, savings and investments, etc.

Census Data

Congress has authorized the executive branch to conduct a number of censuses of the country; the most important of these for business and economic data are:

The Economic Censuses. Done every five years, these censuses provide data covering retail trade, wholesale trade, manufactures, and others.

a) Census of Manufactures (Ref HD section)

b) Census of Retail Trade (Ref HF section)

c) Census of Wholesale Trade (Ref HF section)

More timely but less detailed information is included in Current Business Reports. (Documents collection - C 3.138:)

Corporate and Investment Information

The Portland Campus Library maintains a large collection of corporate annual reports. The collection is in two parts and is located in cabinets at the rear of the Reference Collection:

a) The Fortune 500 company reports, usually for the last two years, as well as approximately thirty reports of companies which have substantial operations in Maine. These reports may be signed out at the circulation desk.

b) The Q File is a collection of corporate reports on microfiche. Annual reports and 10-K's from the New York and American Stock Exchanges are included. There is a paper index to this collection. Copies of reports may be made by using the microfiche reader/printer.

Basic information for many corporations can be found in the following:

Moody's Investors Service, Inc. - USM receives the following publications of the Moody's organization. The publications

are published annually with weekly or semi-weekly updates. Information in the annual volume includes brief history, comparative income statements, and balance sheets. An index of all companies included in the various volumes is kept at the Reference Desk.

Moody's Bank and Finance Manual (Ref HG 4961 M65 year)

Moody's Industrial Manual (Ref HG 4961 M67 year)

Moody's Public Utility Manual (Ref HG 4961 M7245 year)

Moody's Transportation Manual (Ref HG 4971 M74 year)

Moody's OTC Industrial Manual (Ref HG 4961 M7237 year)

Moody's Dividend Record (Ref HG 4028 D5M6) Published twice a week and annually. Lists stock splits, meetings, and dividends for stocks and income bonds.

Moody's Handbook of Common Stocks (Ref HG 4905 M815) For common stocks appearing on the major boards gives brief background, recent developments, and prospects. Financial statistics covering the previous ten years are included. The Handbook appears quarterly. Similar in scope is Standard and Poor's Stock Market Encyclopedia (Ref HG 4921 S68)

Value Line Investment Survey (Ref HG 4501 V261) An investment advisory service that provides weekly analysis on about 1,700 stocks in 95 industries. The information (statistics, sales, dividends, and projections) for any company or industry is updated quarterly. A user's guide is kept at the Reference Desk.

Value Line Options and Convertibles (Ref HG 4501 V42) A companion investment service covering stock options, convertibles and warrants.

Standard & Poor's Industry Surveys (Ref HC 106.6 S74) Provides detailed analysis of many major industries. Current data as well as projections on sales, production, labor, costs of materials, import and export data, etc., are given. For each industry there is a "current analysis" as well as a detailed "basic analysis". Provides the reader with a quick, thorough analysis of the industry chosen. Ask for the Industry Surveys at the Reference Desk.

Standard & Poor's Stock Reports (Ref HG 4905 S4431) Includes three sections: one each for stocks traded over the New York Stock Exchange, the American Stock Exchange, and those traded over the counter. For each stock, summary data on current outlook, net sales, dividend data, new developments, revenues, earnings, etc., are given. Indispensible guides for anyone monitoring any aspect of the stock market.

Standard & Poor's Corporation Records (Ref HG 4501 S76635) Gives an overview of a company's operations. Typically a corporation's capitalization, corporate background, bond descriptions, stock data, earnings and finances, etc. In combination with a company's annual report "Records" reveal many facts.

Trendline's Current Market Perspectives (Ref HG 4916 T73) "Provides price action charts and basic financial data for 1476 listed stocks". Each company chart shows more than three years of market action, including weekly highs, lows, closings, and volume. Best and worst performing stocks are shown as well as industry statistics - useful for inter-company comparisons.

Donoghue's Mutual Funds Almanac (Ref HG 4930 D66 year) A comprehensive source of information about mutual funds, giving the basics on no-load, low-load, and load funds, choosing funds, switching funds, tax considerations, and more. This almanac lays out many of the performance figures for each fund so that sales, assets, plans and so forth may be compared and better understood.

Mutual Fund Fact Book (Ref HG 4905 I5 year) An explanation of the various funds with good statistical appendices showing assets, sales, etc. Published annually.

Dow Jones - Irwin Business and Investment Almanac (Ref HF 5003 D68a year) An all-purpose business almanac with annual compilations of various data. Included, among other things, are stock market information, financial ratios, and compensation for executives.

Donoghue's Moneyletter (Ref HG 4501 D66645) A handy newsletter useful in keeping up with consumer finance, investments, and so forth. Articles or brief discussions of financial planning, ethical investing, money funds, IRA's, Zero coupon bonds, and much more appear on a regular basis. Issued twice a month.

Donoghue's Money Fund Report (Ref HG 4501 D66644) A weekly newsletter on money funds, giving a useful summary of money fund activity for the past week, as well as statistical information on investment results and portfolio holdings of a large variety of money funds.

Fairchild's Financial Manual of Retail Stores (Ref HG 4961 F3 year) Information for retail outlets, including names of officers, sales and net profits, income accounts and balance sheets.

The Outlook (Ref HG 4501 O8 year) Analyzes and forecasts business market trends and individual securities. Makes purchase recommendations. Published weekly by Standard & Poor.

Financial and Operating Ratios

R.M.A. Annual Statement Studies (Ref HF 5681 B1R63 year) The Robert Morris Associates publish the most frequently used ratios (quick ratios, current ratios, etc.) for several sizes of corporations

within an industry. These ratios help the reader understand the proportions allocated by an industry to such things as working capital, sales, and income data.

Almanac of Business and Industrial Financial Ratios (Ref HF 5681 R25T68 year) Financial and operating ratios for about 160 industries based on IRS tax returns.

Selected Maine and Portland Source Materials

Maine Register (Ref JK 2830 M34 year Por Gor) A major source-book for Maine-related information. Included: a classified business directory of the state, an alphabetical directory of Maine manufacturers with numbers of employees, products manufactured, and SIC numbers for each. Published annually.

Maine Marketing Directory (Ref HC 107 M2A3412 year Por Gor) Lists businesses by town, SIC number, and products or service provided.

County Business Patterns: Maine (Ref HC 101 A184 year) Includes employment, payroll, and size of establishments by SIC number for Maine industries. Arranged by county.

Maine Atlas and Gazetteer (Atlas Case G1215 D3 Por Gor) Maps of the entire state. Includes a list of towns and airports. Urban areas are highlighted in pink.

Greater Portland City Directory (Ref F29 P9A183 year Por Gor) Includes an alphabetical business listing with addresses and phone numbers, and a classified listing of businesses.

Suburban Portland Directory (Ref F29 P9A183 year Por Gor) Includes similar information about towns of Cumberland, Falmouth, Freeport, Gorham, North Yarmouth, Scarborough, Westbrook, Windham, and Yarmouth.

Greater Portland Data Book (Ref F29 P9D27 year Por Gor) Includes a wealth of information on Portland demography, transportation, industry, labor, finance, and much more. Ask for it at the Reference desk.

Directory of New England Manufacturers (Ref HD 9723 D45 year) Includes alphabetical, geographical, and products sections.

Bibliographies and Source Books of Business Literature

The following are more comprehensive guides to sources of business information than this brochure.

Brownstone, David M., et al. Where to Find Business Information Second Ed. (Ref HD 30.35 B76) A compilation of more than 5000 sources of information. This book has both subject and publisher's indexes and lists sources of current interest like magazines, annuals, newsletters, etc.

Daniells, L. M. Business Information Sources (Ref Z 7164 C81D16) A selected annotated list of business books and reference sources with an emphasis on recent material. Ask at the Reference Desk for this book.

Feasibility Checklist for Starting a Small Business One of a series of useful "Management Aids" published by the U.S. Small Business Administration. Ask for this leaflet at the Reference Desk.

Maynos, Van et al. Business Information: Applications and Sources (Ref HD 30.35 M35) An extensive compilation including sources of information in banking, economics, finance, market and sales planning, research, government sources, computerized sources and so forth.

Small Business Sourcebook (Ref HD 2346 U5 S65 Por Gor) A guide to the information services and sources provided to 100 small businesses by associations, consultants, educational programs, franchisers, government agencies, reference works, statisticians, suppliers, trade shows and venture capital firms.

Wasserman, P. Encyclopedia of Business Information Sources (Ref HF 5353 E9) Designed to serve the need for a quick survey of sources covering a business field or industry, such as travel agencies, the paper industry or direct mail advertising. Material is arranged under about 1300 subjects and within each subject, sources of information are arranged by type - e.g., bibliographies, directories, handbooks, statistics sources, etc.

June, 1986